Revised Budget

Complete Revised Budget

1 Introduction

The budget is a critical part of any proposal, and it is vital in the determination of funding for potential grants, cooperative agreements, and interagency awards. The Project Manager (PM) assigned to your proposal may request a revised budget from the awardee. The Revised Budget Task will usually be completed and submitted by the Sponsored Research Office/Business Official/Authorizing Officer (SRO/BO/AO), but anyone with access to the award (including the PI) can supply the content for the revised budget.

The purpose of this document is to provide step-by-step instructions for users to follow to complete and submit the Revised Budget task.

2 Prerequisites

Before the Revised Budget task can be completed, the following criteria must be met:

- The institution has submitted a proposal.
- The user is associated to a proposal as the PI or SRO/BO/AO.
- A Complete Revised Budget task has been created.

3 Completing the Revised Budget Task

Use the following steps to complete and submit a Revised Budget.

3.1 Accessing the Revised Budget Task

Use the following steps to access the Revised Budget task.

1. Log in to the PAMS external website at: https://pamspublic.science.energy.gov/.

2. Click the **Tasks with a deadline** link located in the Tasks Assigned To You section on the PAMS homepage (*Figure 1*).
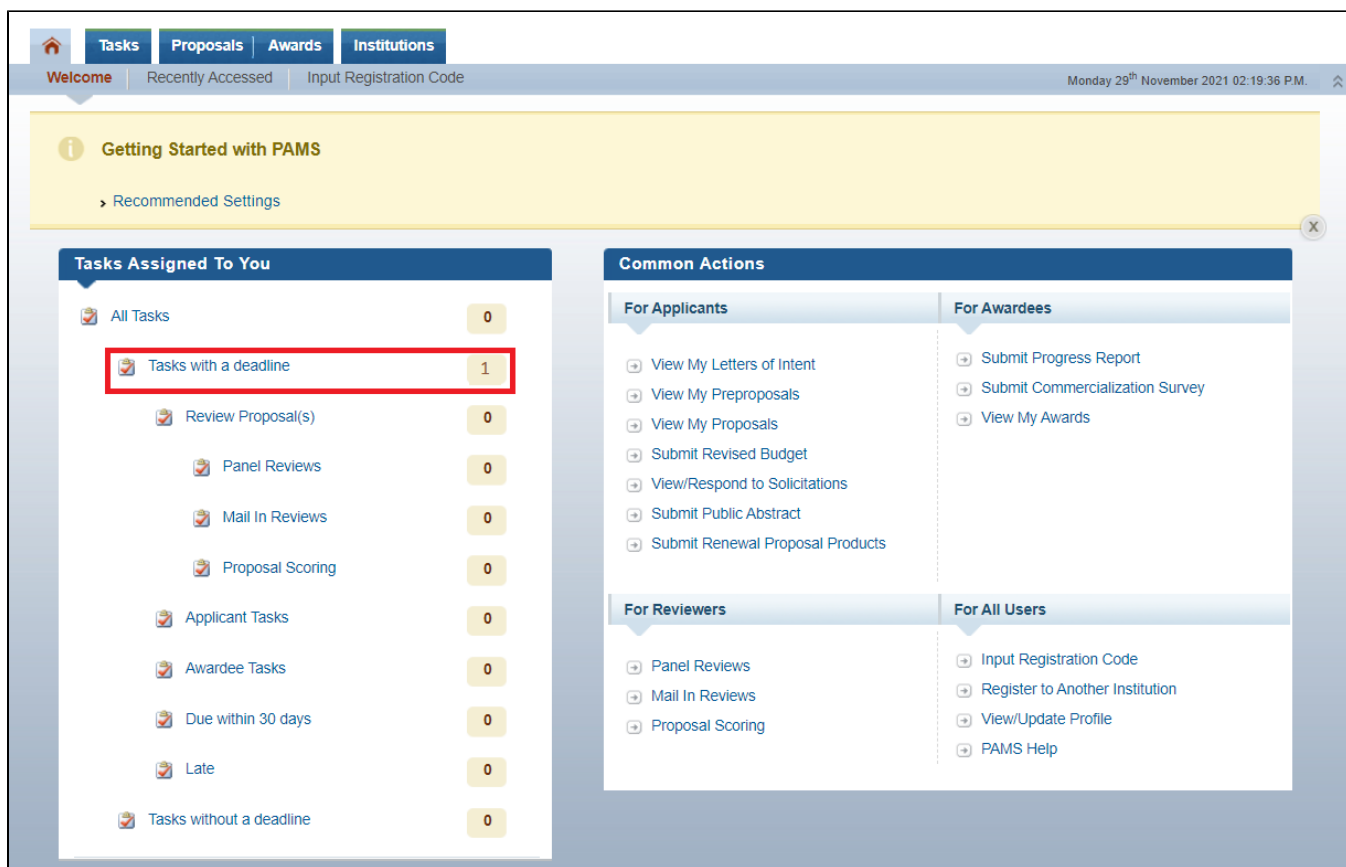
Figure 1. PAMS Homepage – Tasks with a deadline

3. PAMS will navigate you to the Pending Tasks – List page, which displays all of the tasks assigned to you in PAMS. Find the Complete Revised Budget task you would like to complete, and click **Start Revised Budget** in the Options column (*Figure 2*). If necessary, use the filters in the grid or click the **Search** link on the right above the grid to find a specific Complete Revised Budget task.
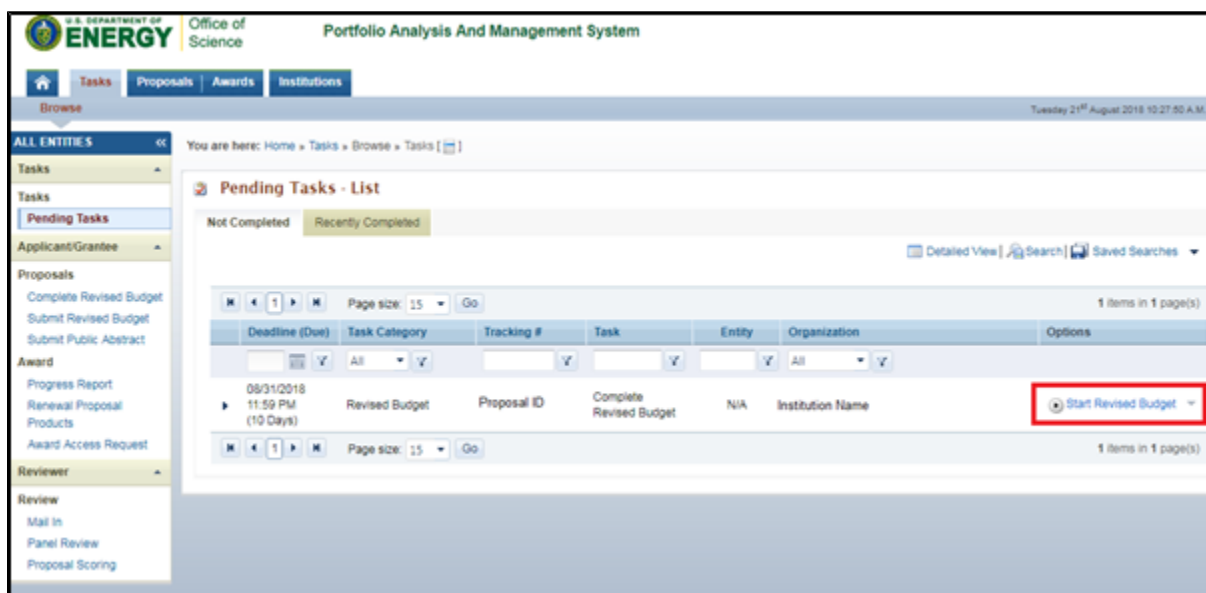

Figure 2. Pending Tasks – List – Start Revised Budget

3.2 Completing the Revised Budget Task

The Complete Revised Budget page consists of four tabs: Cover Page, Budget, Projects/Subawards (optional), and Attachments. Use the following steps to complete the Complete Revised Budget task.

3.2.1 Cover Page Tab

The Cover Page is always marked as complete, because it consists of read-only information. You can view the information, but you will not be able to make any changes (*Figure 3*).

Note	Each tab on the Complete Revised Budget page will be marked as "Complete" (marked with a green checkmark to the left of the tab name) or "Not Started"/"In Progress" (marked with a green checkmark with a red slash to the left of the tab name). All sections must be marked as complete before you can submit the Complete Revised Budget task.

Figure 3. Complete Revised Budget – Cover Page

3.2.2 Budget Tab

Use the following steps to complete the Budget tab of the Complete Revised Budget task.

1. Navigate to the Budget tab. PAMS will display either the proposal budget or the most recently approved budget revision (*Figure 4*).

2. Review the budget, and determine which sections require revision. (Refer to Figures 5-15 to view each section of the Budget tab.)

3. To edit a section, click the Pencil and Paper icon to the right of the section name (*Figure 4*).

Figure 4. Complete Revised Budget – Budget – Edit, Continue

4. Update all sections as necessary. When you are finished, click the **Continue** button in the bottom right corner of the page to save any changes (Figure 4).

Note	Refer to the table below for guidance on revising each section of the Budget tab. Revisions may not be needed for each section. The PM should provide instructions for any suggested revisions.

Page Elements

Element	Description
A. Senior/Key Person	List all senior/key personnel. This includes the PI and any Co-PIs. (Figure 5)
B. Other Personnel	List all other non-essential personnel. (Figure 6) Non-essential personnel includes: · Post-Doctoral Associates · Graduate Students · Undergraduate Students · Secretarial/Clerical · Engineers · Technicians · Other (up to 4)
C. Equipment Description	List all project equipment. (Figure 7)
D. Travel	List all travel costs (Figure 8). Travel costs include: · Domestic Travel Costs · Foreign Travel Costs

E. Participant/Trainee Support Costs	List all participant and trainee support costs for the duration of the project (Figure 9). Participant/Trainee Support Costs include: · Tuition/Fees/Health Insurance · Stipends · Travel · Subsistence · Other
F. Other Direct Costs	List all other direct costs to the project (Figure 10). Direct Costs include: · Materials and Supplies · Publication Costs · Consultant Services · ADP/Computer Services · Subawards/Consortium/Contractual Costs · Equipment or Facility Rental/User Fees · Alterations and Renovations · Other (up to 3)
G. Direct Costs	This section will automatically populate based on the entries made in the previous sections. (Figure 11)
H. Indirect Costs	List all indirect costs to the project (overhead, G&A, etc.). (Figure 12)
I. Total Direct and Indirect Costs	This section will automatically populate based on the totals of the Direct Costs and Indirect Costs sections. (Figure 13)
J. Fee	Fee is a % of the total cost of the project. (Figure 14)
K. Cost of Project	This section will automatically populate based on the totals calculated from the previous sections. (Figure 15)

Figure 5. Complete Revised Budget – Budget – Senior/Key Person

Note	If your project has more than eight (8) key persons, use the Additional Senior Key Persons section to attach a separate document containing the remaining key persons.

B. Other Personnel

* # of Personnel	* Project Role	Cal. Months ⓘ	Acad. Months ⓘ	Sum. Months ⓘ	* Requested Salary($) ⓘ	* Fringe Benefits ($) ⓘ	Clear Row
1	Post Doctoral Associates	12	0	0	$ 54,808.71	$ 18,141.69	Clear
0	Graduate Students	0	0	0	$ 0.00	$ 0.00	Clear
0	Undergraduate Students	0	0	0	$ 0.00	$ 0.00	Clear
0	Secretarial/Clerical	0	0	0	$ 0.00	$ 0.00	Clear
	Engineers				$	$	Clear
	Technicians				$	$	Clear
0	Allocated Admin Support	0	0	0	$ 0.00	$ 0.00	Clear
0	Other Professionals	0	0	0	$ 0.00	$ 0.00	Clear
0	Other	0	0	0	$ 0.00	$ 0.00	Clear
					$	$	Clear

Cancel Continue

Figure 6. Complete Revised Budget – Budget – Other Personnel

⊕ Add Row

C. Equipment Description

List items and dollar amount for each item exceeding $5,000

Equipment Item	Funds Requested ($)	Clear Row
Laser Engraver	$ 5,500.00	Clear

Total Funds requested for all equipment in the attached file $ 0.0000

Cancel Continue

▼ Additional Equipment (Maximum 1)   Attach File

No documents attached

Figure 7. Complete Revised Budget – Budget – Equipment Description

D. Travel

#	Item	Funds Requested ($)
1.	Domestic Travel Costs (Incl. Canada, Mexico, and U.S. Possessions)	$ 2,500.00
2.	Foreign Travel Costs	$ 0.00

Cancel Continue

Figure 8. Complete Revised Budget – Budget – Travel

Figure 9. Complete Revised Budget – Budget – Participant/Trainee Support Costs

#	Item	Funds Requested ($)
	F. Other Direct Costs	
1.	Materials and Supplies	$17,727.00
2.	Publication Costs	Not Provided
3.	Consultant Services	Not Provided
4.	ADP/Computer Services	Not Provided
5.	Subawards/Consortium/Contractual Costs	Not Provided
6.	Equipment or Facility Rental/User Fees	$3,000.00
7.	Alterations and Renovations	Not Provided
8.	Other 1 (Tuition Remission)	$8,000.00
9.	Other 2	Not Provided
10.	Other 3	Not Provided
11.	Other 4	Not Provided
12.	Other 5	Not Provided
13.	Other 6	Not Provided
14.	Other 7	Not Provided
15.	Other 8	Not Provided
16.	Other 9	Not Provided
17.	Other 10	Not Provided
	Total Other Direct Costs	$28,727.00

Figure 10. Complete Revised Budget – Budget – Other Direct Costs

#	Item	Funds Requested ($)
	G. Direct Costs	
1.	Total Direct Costs (A thru F)	$242,850.32

Figure 11. Complete Revised Budget – Budget – Direct Costs

Note	The Direct Costs section will automatically populate based on the entries made in the previous sections. You will not be able to manually edit this section.

Figure 12. Complete Revised Budget – Budget – Indirect Costs

Figure 13. Complete Revised Budget – Budget – Total Direct and Indirect Costs

Note	The Total Direct and Indirect Costs section will automatically populate based on the totals made in the Direct Costs and Indirect Costs sections. You will not be able to manually edit this section.

Figure 14. Complete Revised Budget – Budget – Fee

Figure 15. Complete Revised Budget – Budget – Cost of Project

Note	This section will automatically populate based on the totals calculated from the previous sections. You will not be able to manually edit this section.

5. Once you have completed all the necessary revisions for each budget period, you must attach and upload a detailed Budget Justification narrative. The Budget Justification should describe and clarify the revisions you made to the budget. To attach a Budget Justification, click **Attach File** in the Budget Justification header. This will expand the section and prompt you to upload a file (*Figure 16*).

6. Click **Choose File,** and select the file you would like to attach to the Revised Budget.

Note	• You can attach a maximum of one (1) attachment. • You can include a description of 500 characters or less for the attachment in the Description box in the Budget Justification section.

Figure 16. Complete Revised Budget – Budget – Budget Justification

7. Once you have selected the file you would like to attach, click **Upload** (*Figure 16*).

8. Once you have completed the Budget tab, select **Save All Budget Periods and Continue to Next Section** from the **Choose Action** dropdown in the bottom right corner of the page and click **Go** (*Figure 17*).

Figure 17. Complete Revised Budget – Budget – Save All Budget Periods and Continue to Next Section

9. PAMS will redirect you to the next section, and mark the Budget tab as complete (marked by a green checkmark in the Budget tab) (*Figure 18*).

3.2.3 Projects/Subawards (Optional) Tab

The Projects/Subawards section of the Revised Budget is optional. Use the following steps to complete the Projects/Subawards section of the Complete Revised Budget task if you would like to add a project or subaward budget.

1. Navigate to the Projects/Subawards (Optional) tab.

2. To add a project/subaward, click the **Add Project/Subaward** link on the left above the grid (*Figure 18*).

Figure 18. Complete Revised Budget – Subawards

3. The Project/Subaward tab mirrors the Budget tab you completed in the section above. For guidance on completing the Project/Subawards tab, refer to section *2.2 Budget Tab*.

Note	If your proposal submission included a project/subaward, that information will automatically populate in the Project/Subaward tab in the Revised Budget task. You will not have to add it again.

3.2.4 Attachments Tab

Use the following steps to complete the Attachments section of the Complete Revised Budget task.

1. Navigate to the Attachments tab.

2. Should the budget revision require a revision to the scope of the project, you will need to attach supporting documents detailing the revised scope. To attach supporting documents to the Revised Scope section of the Attachments tab, click **Attach File** in the Revised Scope header. This will expand the section and prompt you to upload a file (*Figure 19*).

3. Click **Choose File,** and select the file you would like to attach to the Revised Budget.

Note	• You can attach a maximum of one (1) attachment. • You can include a description of 500 characters or less for the attachment in the Description box in the Revised Scope section.

Figure 19. Complete Revised Budget – Attachments

4. Once you have selected the file you would like to attach, click **Upload** (*Figure 19*).

5. Once you have completed the Attachments tab, select **Save Attachments** from the **Choose Action** dropdown in the bottom right corner of the page and click **Go** (*Figure 20*).

Figure 20. Complete Revised Budget – Attachments – Save Attachments

3.3 Submitting the Revised Budget

Once each section of the Complete Revised Budget task is complete (each tab will be marked with the green checkmark), if you possess the proper submission privileges, you can submit the revised budget to DOE for review. Use the following steps to submit the Revised Budget to DOE.

3.3.1 Submit to DOE Privilege

Use the following steps to submit the Revised Budget to DOE for review.

1. Select **Save and Submit to DOE** in the dropdown on the Submit Revised Budget page and click **Go** (*Figure 21*).

Figure 21. Submit Revised Budget – Save and Submit to DOE

2. PAMS will redirect you to the Submit Revised Budget – List page and display a Success message confirming that the Revised Budget was submitted to DOE successfully (*Figure 22*).
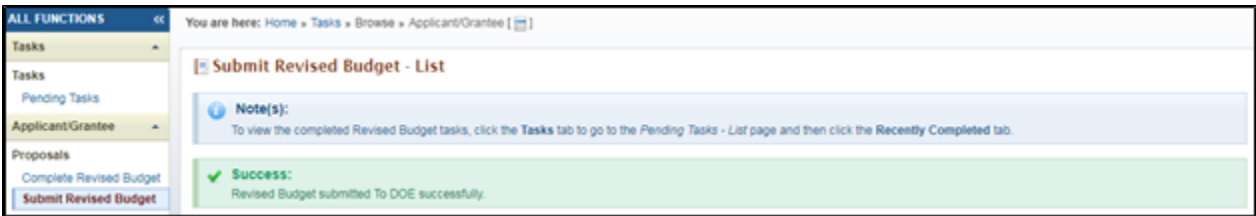

Figure 22. Submit Revised Budget – List – Success

3.3.2 No Submit to DOE Privilege

In some cases, the user will be able to complete the Revised Budget but not submit it to DOE. If the user does not have the proper submission privileges, s/he will see an option to **Save and Submit to SRO/BO/AO** in the dropdown menu. Use the following steps to submit the Complete Revised Budget task if you do not possess the Submit to DOE privilege.

1. Select **Save and Submit to SRO/BO/AO** from the **Choose Action** dropdown on the Complete Revised Budget page and click **Go** (*Figure 23*).

Figure 23. Complete Revised Budget – Save and Submit

 Selecting this option will create a task for the SRO/BO/AO to Submit the Revised Budget to DOE for review. Once the SRO/BO/AO has received the task, s/he will navigate to the Submit Revised Budget page and follow the steps in section *3.1.1 Submit to DOE Privilege*.

2. PAMS will redirect you to the Complete Revised Budget – List page and display a Success message confirming that the Revised Budget was submitted to the SRO/BO/AO successfully (*Figure 24*).
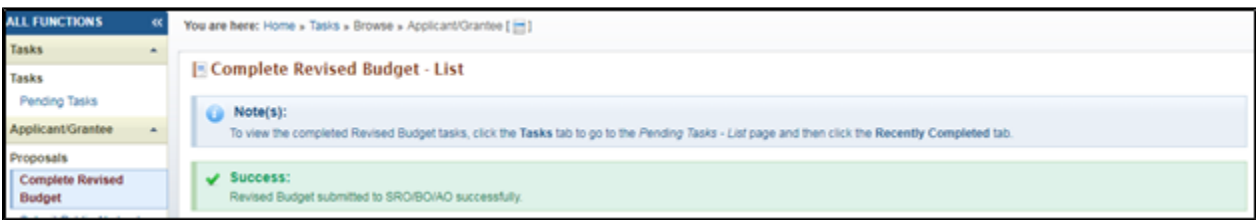

Figure 24. Complete Revised Budget – List – Success Message